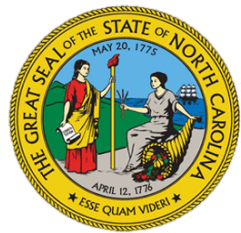


North Carolina COVID-19 Vaccine Management System

CVMS Organization Portal User Guide

Version 2

February 26, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



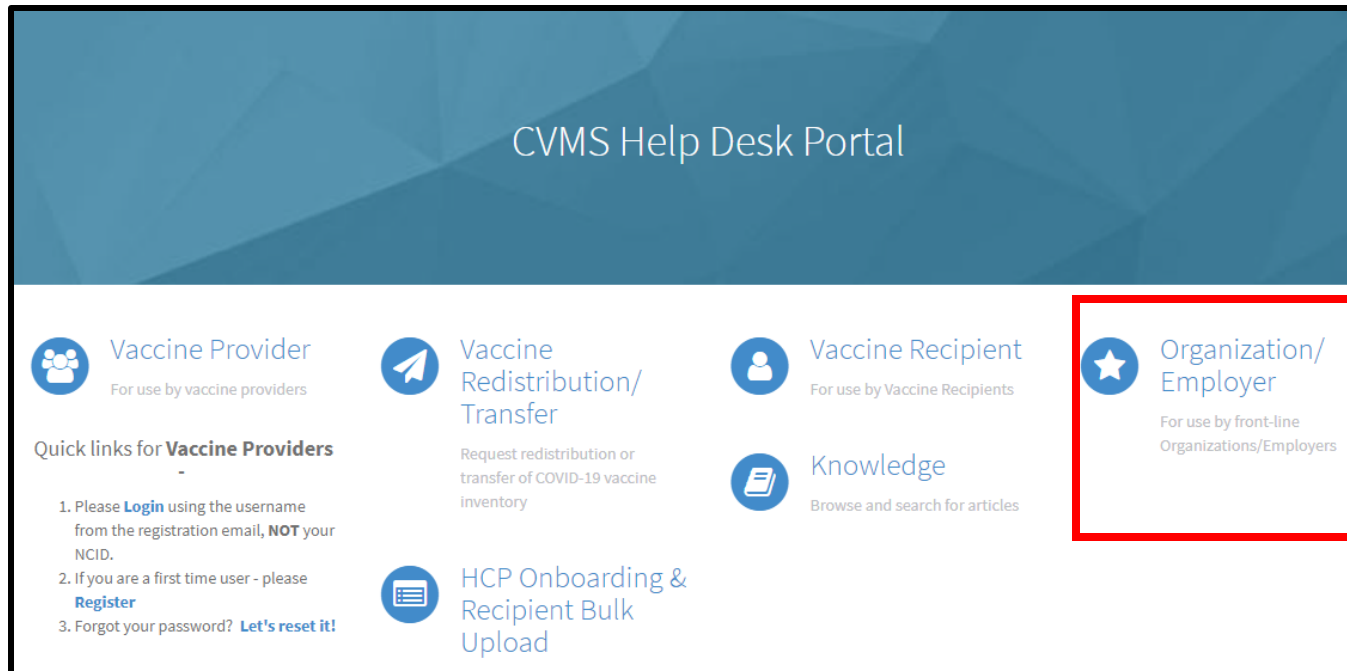


If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the Provider & Organization Contact Center at (877) 873-6247 and select option 8. The Provider & Organization Contact Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET



On the home page of the CVMS Help Desk Portal, select the “**Organization/Employer**” option to submit your question, issue, or request.

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Process Overview

Overview

The screenshot displays the NCDHHS CVMS Organization Portal interface. At the top, there's a navigation bar with 'Home', 'Bulk Registration', and 'Help & Information'. Below this, a section titled 'Instructions for Bulk Registration: Employee Upload' provides a numbered list of steps: 1. Download the Bulk Registration Upload Excel template. 2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. 3. Note: All fields are required for each record, including a valid, unique email address. 4. Use this 'Bulk Registration' tab in the CVMS Organization Portal to load the Excel .csv file. 5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab. 6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration. Below the instructions, there's a link to training materials: <https://immunize.nc.gov/providers/covid-19training.htm>. The interface also features tabs for 'Low Volume (100)' and 'High Volume (5,000)'. The 'Employee Upload (Low Volume)' section is active, showing a 'Drag and Drop CSV file here' area. At the bottom, there's a search bar and a table with columns for 'First Name', 'Last Name', and 'Email', currently displaying 'No results'.

This guide is intended for frontline workers' organization which are *not* Healthcare Vaccine Providers.

As a frontline workers' organization, you will have the opportunity to upload your eligible recipients into the CVMS Organization Portal so that they can register in the COVID-19 Vaccine Portal prior to receiving the COVID-19 vaccine.

This user guide will focus on four core areas:

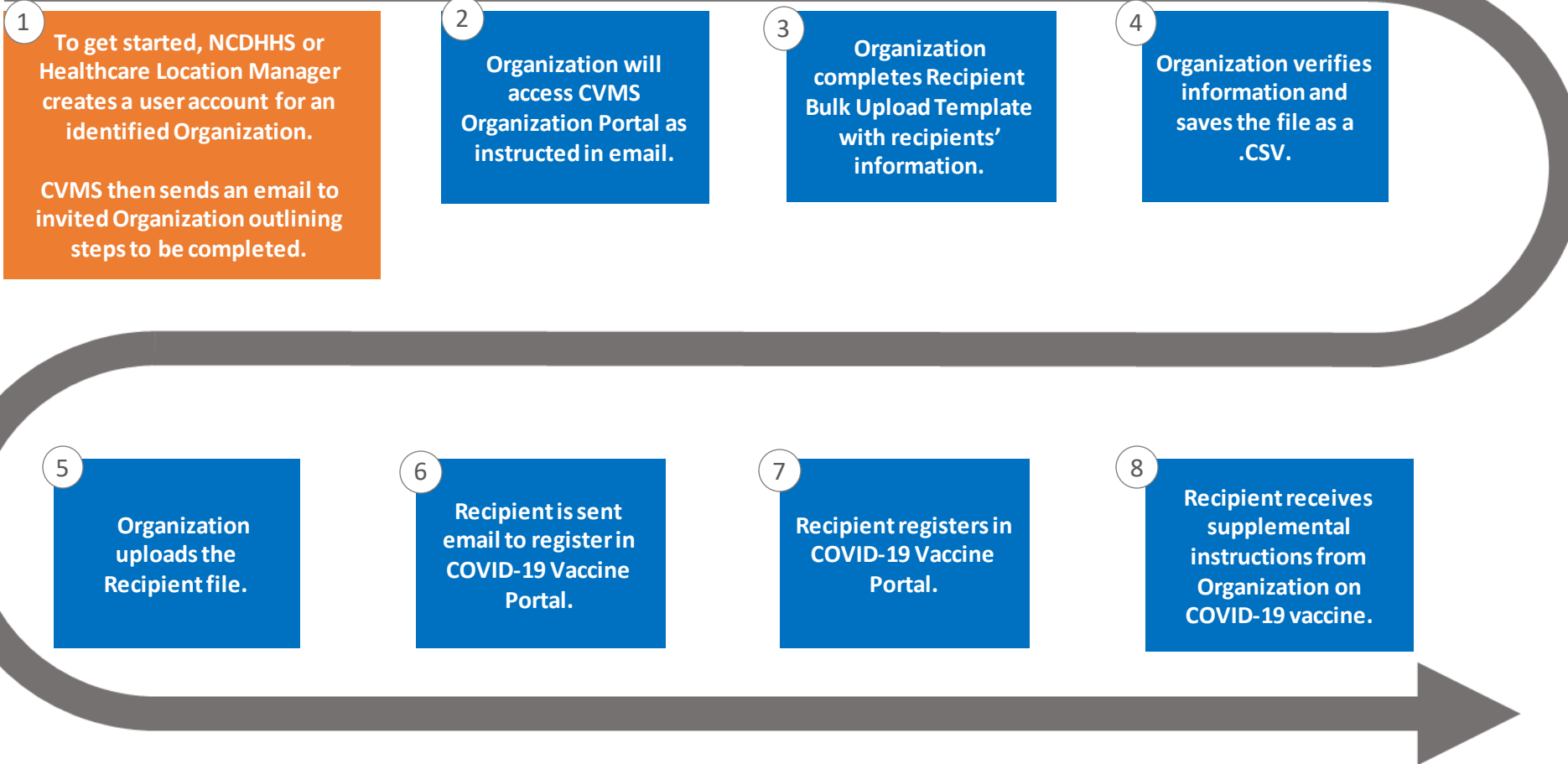
1. Completing the Recipient Bulk Upload Template
2. Uploading the Recipient Bulk Upload File to the CVMS Organization Portal
3. Correcting File Errors & Re-uploading
4. Viewing uploaded Recipient records

You will also need to:

- Use the latest version of Chrome, Edge (Chromium only), Firefox, or Safari browsers (Internet Explorer and Edge non-chromium browsers are not supported)
- Use Microsoft Excel to edit the Recipient Bulk Upload Template file (or any equivalent spreadsheet editor)
- Log in the CVMS Organization Portal account at <https://covid-vaccine-employer-portal.ncdhhs.gov>

Now, let's get started!

Recipient Bulk Upload Registration Process Overview



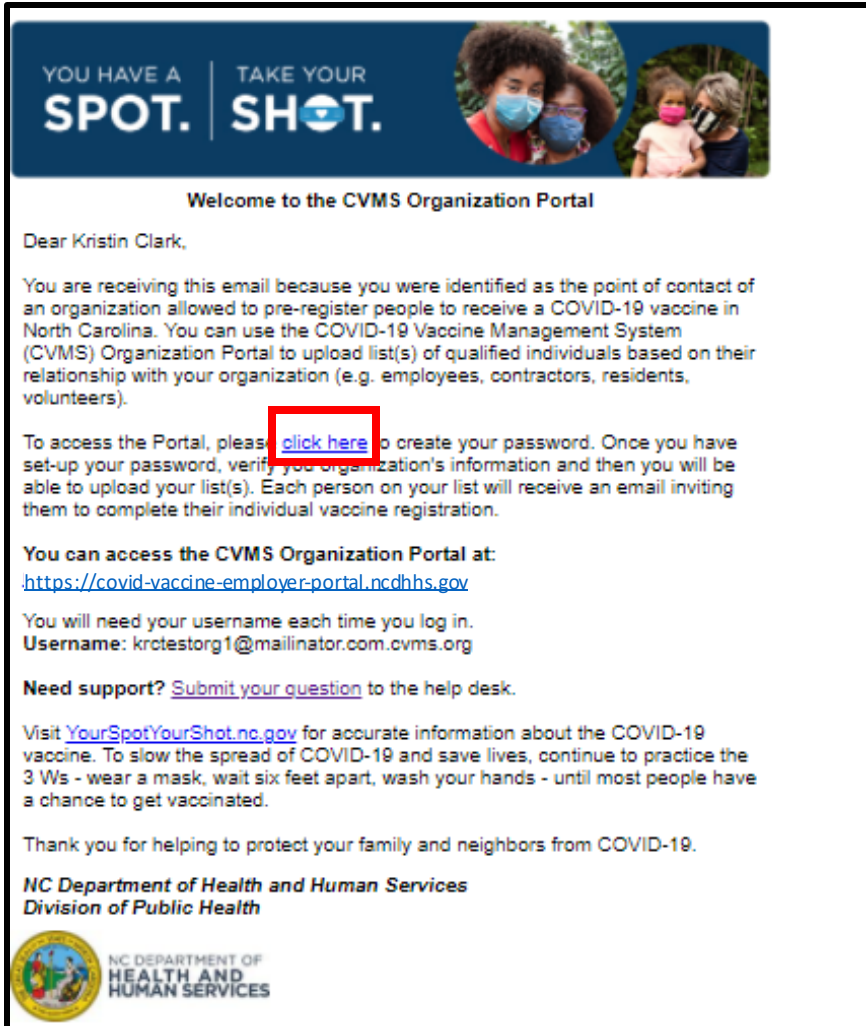
Audience

Organization Point of Contact

A COVID-19 Vaccine Portal Account is NOT REQUIRED to receive the COVID-19 vaccine. Recipients may contact a participating COVID-19 vaccinating provider to verify their Eligibility Status and schedule an appointment to receive the COVID-19 vaccine (if eligible).

Log-In the CVMS Organization Portal

Step 1 of 4: Receive Email & Follow Email Instructions



First, the NCDHHS team or a Healthcare Location Manager at any enrolled COVID-19 vaccinating provider (e.g., Local Health Department) will invite your Organization to register.

You will receive an email from nccvms@dhhs.nc.gov inviting you to complete registration in the CVMS Organization Portal.

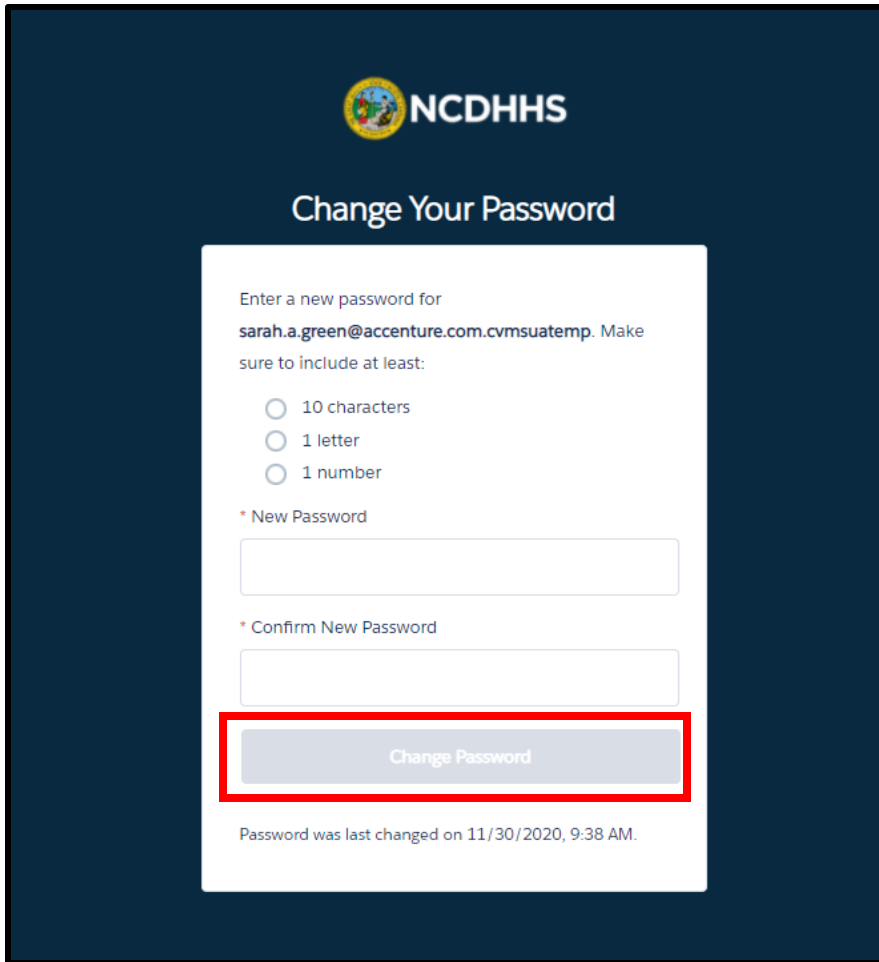
The username included in the email will be your **CVMS ORGANIZATION PORTAL USERNAME**.

1. Click the **HYPERLINK** to reset your password

Audience

Organization Point
of Contact

Step 2 of 4: Change Password



The screenshot shows a web form titled "Change Your Password" from NCDHHS. The form is set against a dark blue background. At the top, the NCDHHS logo is visible. The main heading "Change Your Password" is centered. Below it, the text reads: "Enter a new password for sarah.a.green@accenture.com.cvmsuatemp. Make sure to include at least:". There are three radio button options: "10 characters", "1 letter", and "1 number". Below these are two text input fields labeled "* New Password" and "* Confirm New Password". A red rectangular box highlights the "Change Password" button at the bottom of the form. At the very bottom, a status message says "Password was last changed on 11/30/2020, 9:38 AM."

After clicking the link in the email, you will be prompted to **CHANGE YOUR PASSWORD**.

1. Enter a **NEW PASSWORD**
2. Re-enter the **NEW PASSWORD TO CONFIRM**
3. Click **CHANGE PASSWORD**

After creating the password, you will be automatically logged in to the CVMS Organization Portal.

Audience

Organization Point
of Contact

Step 3 of 4: View the CVMS Organization Portal Homepage

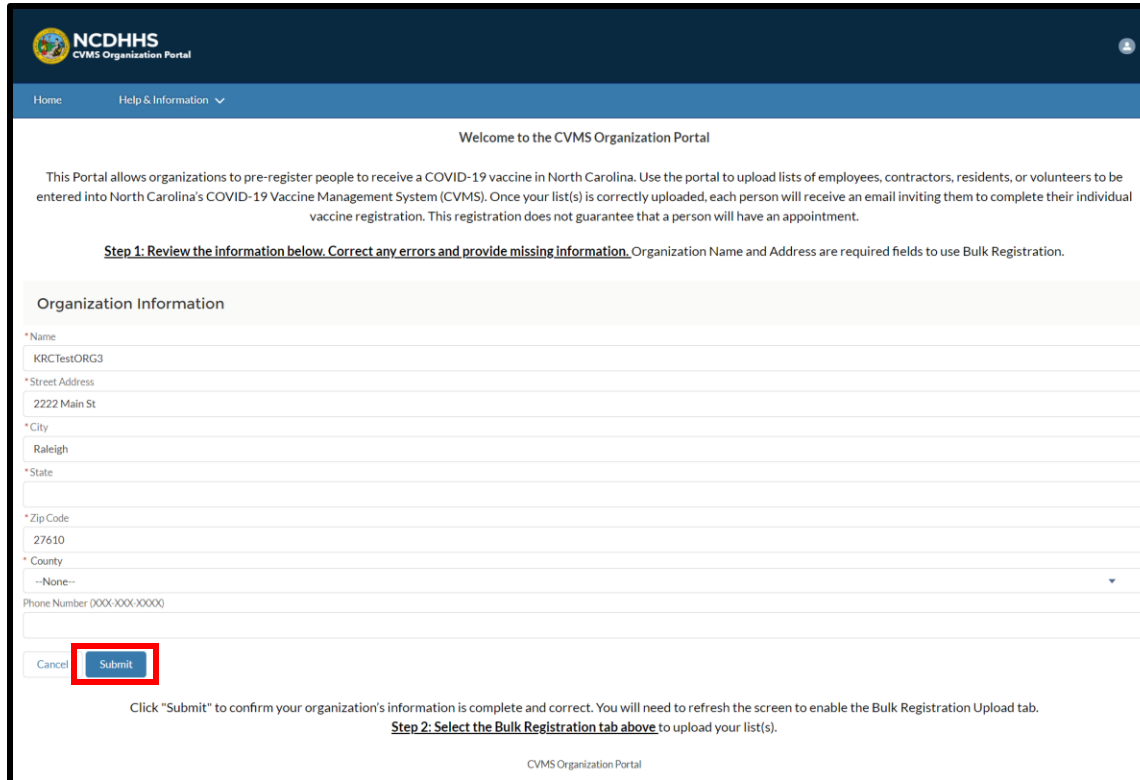
The CVMS Organization Portal Homepage will be the main page for you to complete your required activities.

Before being able to begin the bulk upload process, the Org Point of Contact needs to verify their organization's information. Only after the SUBMIT button is clicked can the **BULK REGISTRATION TAB** be accessed

1. Review and **UPDATE** the different fields
2. Click **SUBMIT**

Audience

Organization Point
of Contact



The screenshot displays the CVMS Organization Portal homepage. At the top, there is a dark blue header with the NCDHHS logo and the text "CVMS Organization Portal". Below the header is a navigation bar with "Home" and "Help & Information" (with a dropdown arrow). The main content area has a white background and a blue border. It starts with a "Welcome to the CVMS Organization Portal" message. Below this is a paragraph explaining the portal's purpose: "This Portal allows organizations to pre-register people to receive a COVID-19 vaccine in North Carolina. Use the portal to upload lists of employees, contractors, residents, or volunteers to be entered into North Carolina's COVID-19 Vaccine Management System (CVMS). Once your list(s) is correctly uploaded, each person will receive an email inviting them to complete their individual vaccine registration. This registration does not guarantee that a person will have an appointment." This is followed by a step instruction: "Step 1: Review the information below. Correct any errors and provide missing information. Organization Name and Address are required fields to use Bulk Registration." Below this is a form titled "Organization Information". The form contains several fields: "Name" (with "KRCtestORG3" entered), "Street Address" (with "2222 Main St" entered), "City" (with "Raleigh" entered), "State" (empty), "Zip Code" (with "27610" entered), and "County" (a dropdown menu showing "--None--"). There is also a "Phone Number (XXX-XXX-XXXX)" field. At the bottom of the form are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red rectangle. Below the form, there is a note: "Click 'Submit' to confirm your organization's information is complete and correct. You will need to refresh the screen to enable the Bulk Registration Upload tab." This is followed by another step instruction: "Step 2: Select the Bulk Registration tab above to upload your list(s)." The footer of the page says "CVMS Organization Portal".


Step 4 of 4: View the CVMS Organization Portal Homepage

After submitting your registration details, a new **BULK REGISTRATION** tab will appear in the header.

You may now begin the **RECIPIENT BULK UPLOAD PROCESS** to invite your recipients to register for the covid-19 vaccine in CVMS. Having recipients pre-registering in CVMS prior receiving the vaccine will significantly shorten the process the providers have to go through the day of their vaccination.

Audience

Organization Point
of Contact



NCDHHS
CVMS Organization Portal

Home

Bulk Registration

Help & Information

Welcome to the CVMS Organization Portal

This Portal allows organizations to pre-register people to receive a COVID-19 vaccine in North Carolina. Use the portal to upload lists of employees, contractors, residents, or volunteers to be entered into North Carolina's COVID-19 Vaccine Management System (CVMS). Once your list(s) is correctly uploaded, each person will receive an email inviting them to complete their individual vaccine registration. This registration does not guarantee that a person will have an appointment.

Step 1: Review the information below. Correct any errors and provide missing information. Organization Name and Address are required fields to use Bulk Registration.

Organization Information

* Name

KRCTestORG3

* Street Address

2222 Main St

* City

Raleigh

* State

NC

* Zip Code

27610

* County

Phone Number (XXX-XXX-XXXX)

Cancel

Submit

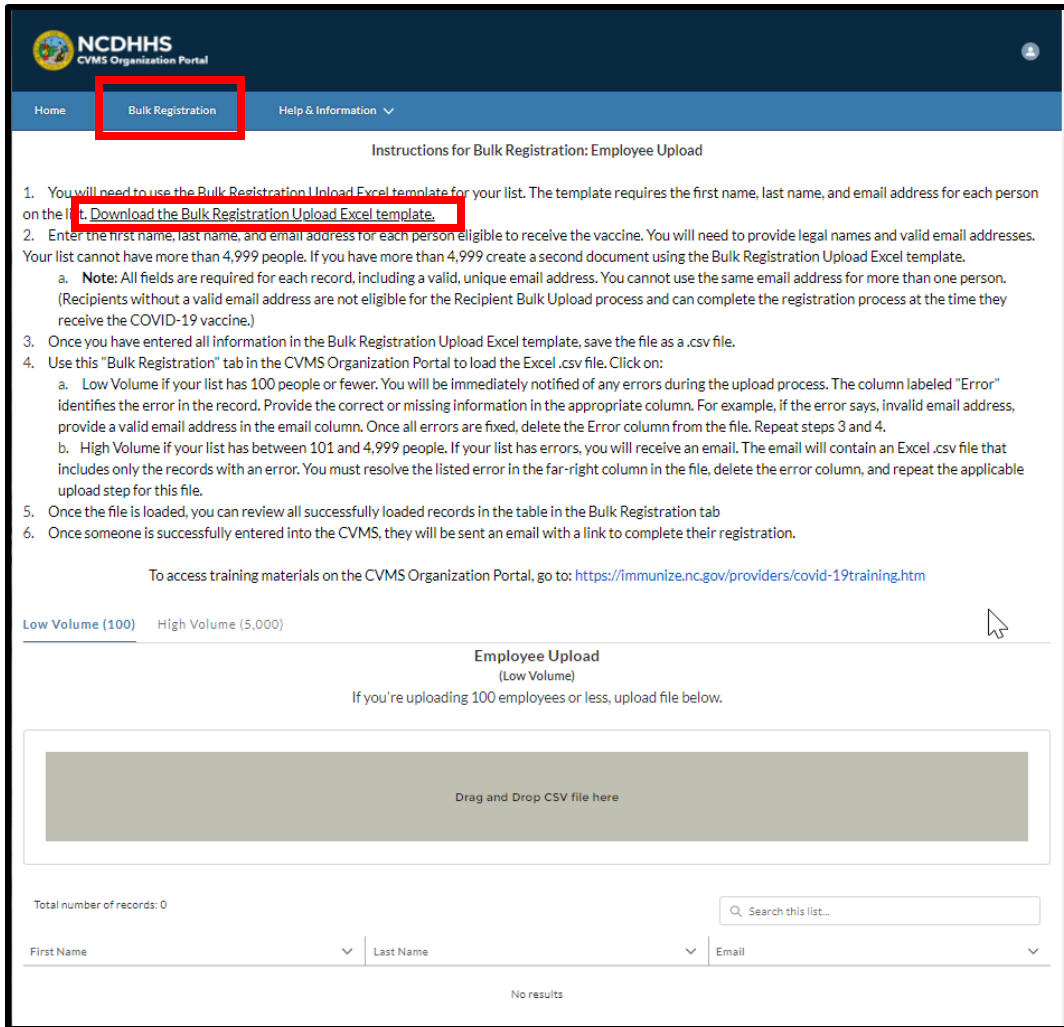
Click "Submit" to confirm your organization's information is complete and correct. You will need to refresh the screen to enable the Bulk Registration Upload tab.

Step 2: Select the Bulk Registration tab above to upload your list(s).

CVMS Organization Portal

Prepare the Recipient Bulk Upload File

Step 1 of 4: Download the Recipient Bulk Upload Template

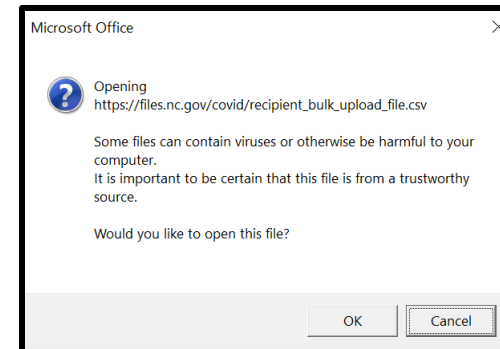


The screenshot shows the NCDHHS CVMS Organization Portal. The 'Bulk Registration' tab is highlighted in the top navigation bar. Below the navigation bar, the page title is 'Instructions for Bulk Registration: Employee Upload'. The main content area contains a list of instructions for bulk registration. A red box highlights the first instruction: '1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)' Below the instructions, there is a link to training materials: 'To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>'. At the bottom, there is a section for 'Employee Upload (Low Volume)' with a 'Drag and Drop CSV file here' area and a search bar.

After clicking the Bulk Registration tab, you will click the link in STEP1 to download the bulk registration upload Excel template.

1. Click on the **Bulk Registration** tab
2. Click the phrase **Download the Bulk Registration Upload Excel template**

Note: If the following error message appears, please click on **OK**:



3. When the file is downloaded, **OPEN IT** in Excel

Audience

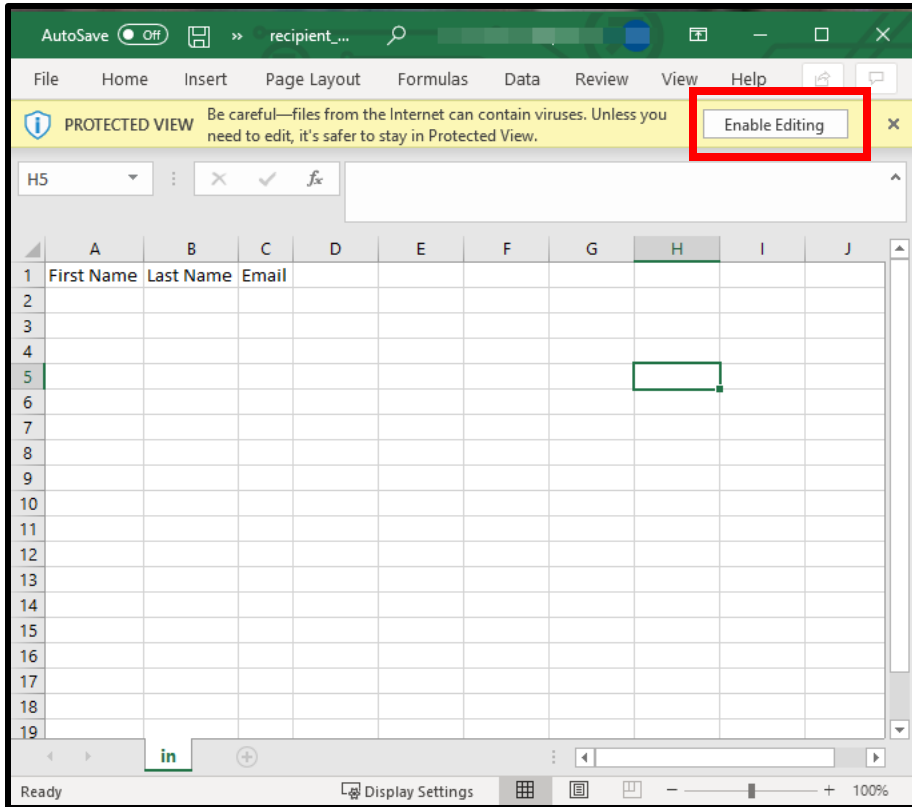
Organization Point of Contact

Tips

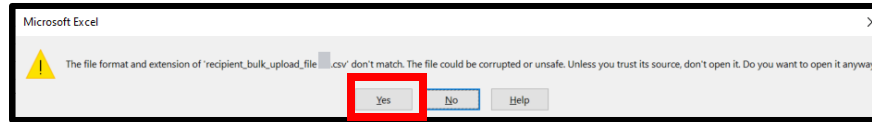
The template is also posted on the DHHS website at: https://files.nc.gov/covid/recipient_bulk_upload_file.csv

In general, downloaded files are automatically saved in the Downloads folder. This folder is usually located on the drive where Windows is installed (for example, C:\users\your name\downloads).

Step 2 of 4: Open the Recipient Bulk Upload file in Excel



1. Open the **RECIPIENT BULK UPLOAD** file in Excel
2. If an alert message on the file format appears, click “Yes” to confirm you wish to open the file



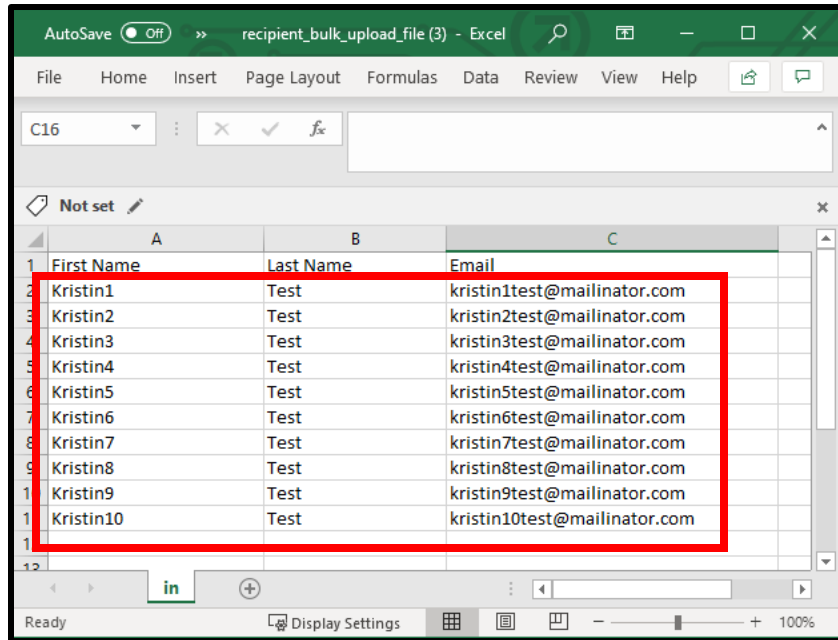
3. In Excel at the top of the file, click on **ENABLE EDITING** to be allowed to enter data

Audience

Organization Point
of Contact

Step 3 of 4: Add Recipients Data to Bulk Upload Template

To begin the Recipient Bulk Upload process, you will need to collect information on your Recipients. Ensure that legal names and real email addresses are captured. Please do not enter more than 5,000 recipients in the file. If you need to enter more than 5,000 recipients, please create a second file. You can upload as many files as needed.



	A	B	C
1	First Name	Last Name	Email
2	Kristin1	Test	kristin1test@mailinator.com
3	Kristin2	Test	kristin2test@mailinator.com
4	Kristin3	Test	kristin3test@mailinator.com
5	Kristin4	Test	kristin4test@mailinator.com
6	Kristin5	Test	kristin5test@mailinator.com
7	Kristin6	Test	kristin6test@mailinator.com
8	Kristin7	Test	kristin7test@mailinator.com
9	Kristin8	Test	kristin8test@mailinator.com
10	Kristin9	Test	kristin9test@mailinator.com
11	Kristin10	Test	kristin10test@mailinator.com

1. Enter the following information in the file:

- First Name
- Last Name
- Email Address

Audience

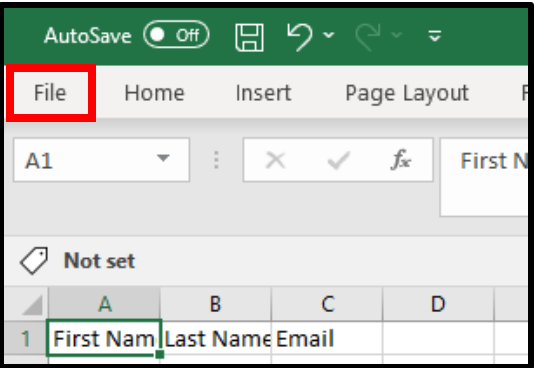
Organization Point
of Contact

Step 4 of 4: Verify & Save the File as a csv file

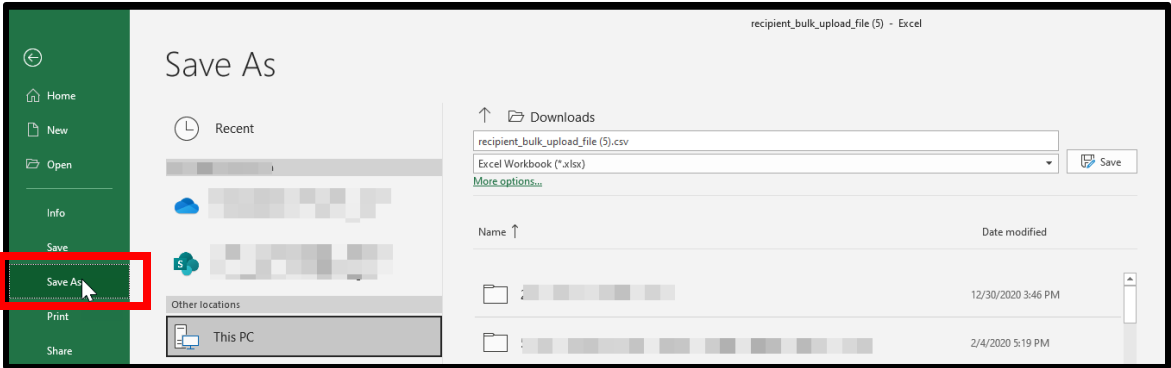
After verifying that all data has been accurately entered into the Excel file, you can **SAVE THE FILE AS A .CSV FILE**.

By default, Excel will change the file format to an .xls Excel file. Please change file format back to a .CSV file.

1. Click the **FILE** button

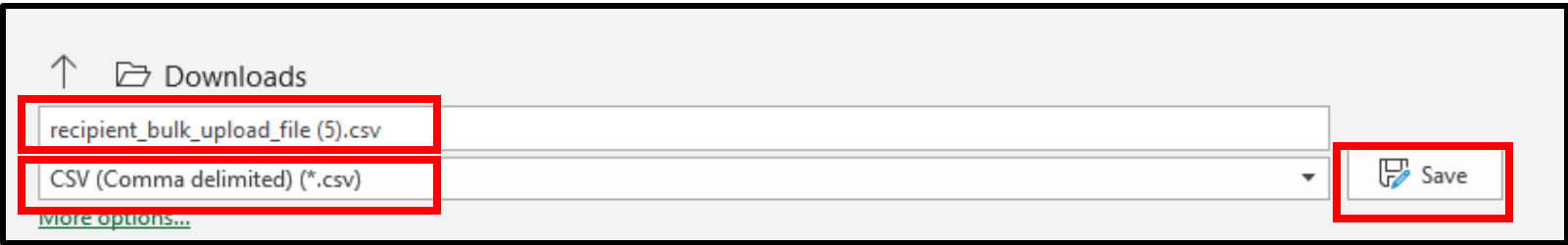


2. Click **SAVE AS**



3. Enter a **FILE NAME** (no name requirement)

4. Select the file type **CSV (comma-delimited) (*.csv)**



5. Click **SAVE**

Audience

Organization Point
of Contact

Tips

Depending on the spreadsheet application and version installed on your computer, differences in that process may apply. Regardless of those differences, save the file as a .csv file.

Option 1 - Upload 100 or Fewer Recipient Records at a Time (Low Volume)

Step 1 of 4: Select the Low Volume tab for 100 or fewer records

We recommend using this method if possible since it will be faster. If you have several hundred recipients, you can create multiple files of 100 or fewer recipients to upload individually. Each file will need to contain 100 or fewer recipients to upload.

- 1. At the top of your Homepage, navigate to the **BULK REGISTRATION** screen
- 2. Select the **LOW VOLUME** tab

HomeBulk RegistrationHelp & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)

2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.

Note: All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)

3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.

4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:

Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.

High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.

5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab

6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100)High Volume (5,000)

Employee Upload
(Low Volume)

If you're uploading 100 employees or less, upload file below.

Drag and Drop CSV file here

Audience

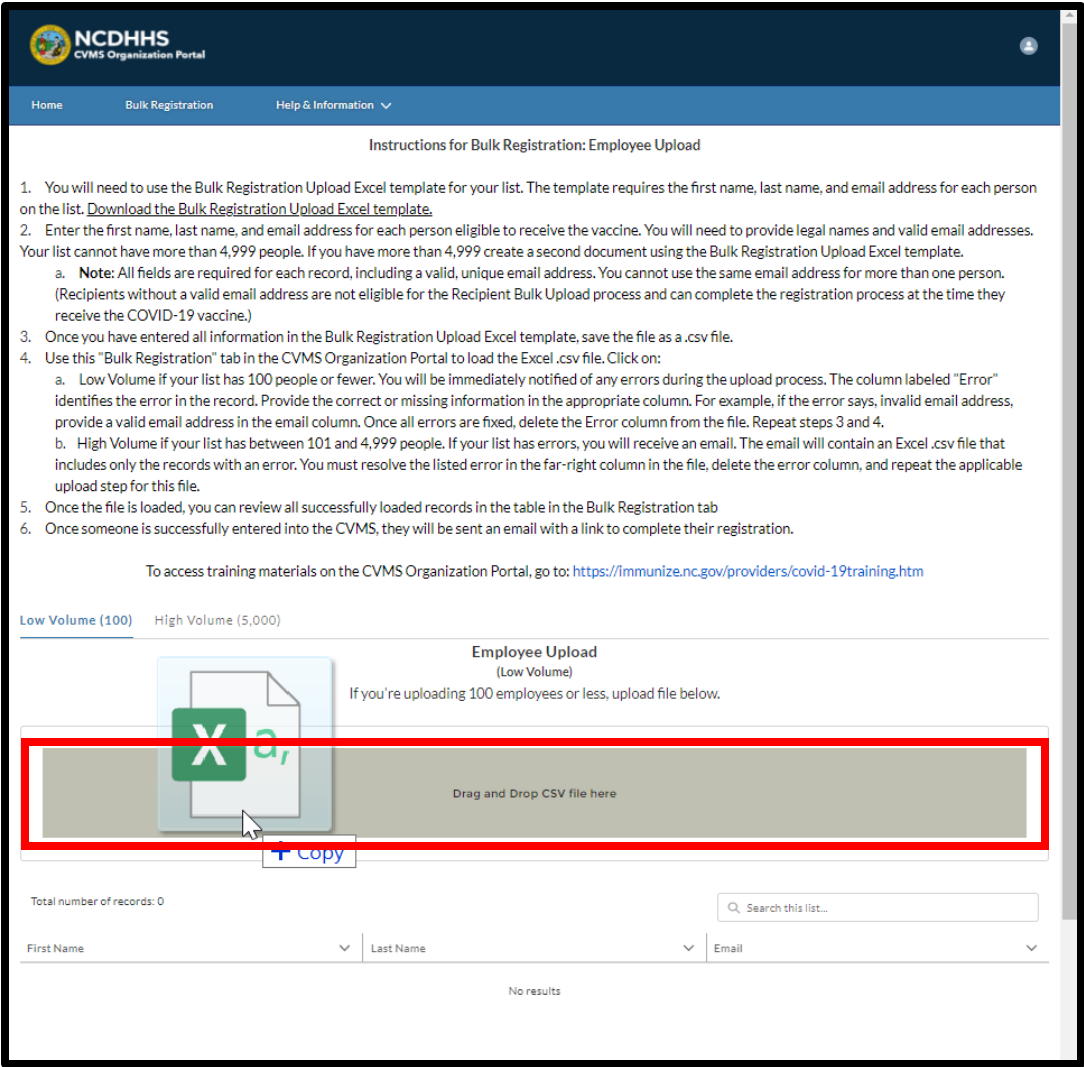
Organization Point of Contact

Tips

The Recipient Bulk Upload File should be saved as a .CSV file.

You may repeat this process multiple times in groups of 100 or less recipients.

Step 2 of 4: Uploading the Recipient Bulk Upload File with the Low Volume Tab



When you upload your Recipient Bulk Upload File using the Low Volume tab, you will be able to review your data before creating the records.

1. Drag and drop your file to the **DRAG AND DROP CSV FILE HERE** area
2. After you dropped the file, you will see the content of the file appear in the table below the **DRAG AND DROP CSV File** area

Audience

Organization Point of Contact

Tips

Remember, you can only upload a maximum of 100 recipient records at a time using the Low Volume tab.

For instructions on using the High-Volume tab, skip to the next section of this User Guide.

Step 3 of 4: Review Your Data in the Low Volume Tab

1. **REVIEW** the uploaded data
2. If you find errors or missing information, click **CANCEL**
 - *Clicking **CANCEL** removes the file*
3. If the data looks correct, click the **CREATE RECORDS** button

Audience

Organization Point
of Contact

Home Bulk Registration Help & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)
2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
 - a. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
 - a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
 - b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100) High Volume (5,000)

Employee Upload

(Low Volume)

If you're uploading 100 employees or less, upload file below.

• KRCTestOrg1_2112021.csv (application/vnd.ms-excel)- 123bytes, last modified: 2/11/2021

FIRST NAME	LAST NAME	EMAIL
Jane	Doe	J.doe@mailinator.com
Jan	Day	J.day@mailinator.com
Jani	Dee	J.dee@mailinator.com

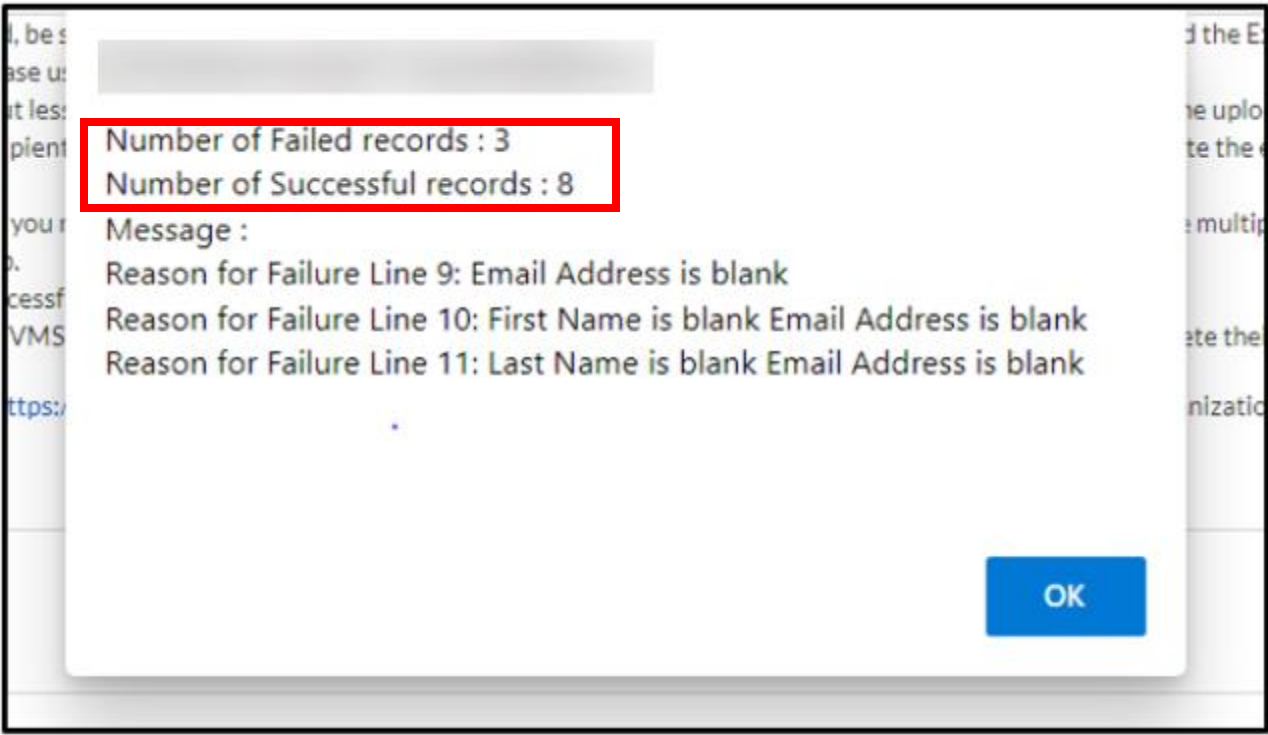
Create Records Cancel

Step 4 of 4: Review Successful and Failed Record Alert Message

After creating the records using the **LOW VOLUME TAB**, you will see an **ALERT MESSAGE** appear. The message will state the number of **SUCCESSFUL** recipient records uploaded and the number of recipient records that **FAILED** to be uploaded.

Once you click **OK**, the recipients who were successfully loaded will be sent **AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** to the **COVID-19 Vaccine Portal**.

*We will cover how to manage **FAILED RECIPIENT UPLOADS** in the **VIEW AND RE-UPLOAD FILE SECTION**.*



Audience

Organization Point
of Contact

Tips

You can view all uploaded recipients in the CVMS Organization Portal, whether they were uploaded through the Low Volume or High-Volume tab.

Option 2 - Upload More than 100 Recipient Records at a Time (High Volume)

Step 1 of 4: Select the High-Volume tab for more than 100 records

If you have a significant number of recipients to upload at once (over 100 recipients, but less than 5,000 recipients), you will need to use the High-Volume process.

1. Click the **HIGH-VOLUME TAB**
2. Click **UPLOAD FILE** and select the prepared Bulk Recipient Upload file **FROM YOUR DESKTOP** or **DRAW AND DROP THE FILE** unto the page

Audience

Organization Point
of Contact

The screenshot displays the 'Instructions for Bulk Registration: Employee Upload' page. It includes a navigation bar with 'Home', 'Bulk Registration', and 'Help & Information'. The main content area lists six steps for uploading a bulk list. Step 4b highlights the 'High Volume' process for lists between 101 and 4,999 people. Below the instructions, a link to training materials is provided. At the bottom, there are two tabs: 'Low Volume (100)' and 'High Volume (5,000)', with the latter being selected and highlighted with a red box. Below the tabs, the section is titled 'Employee Upload (High Volume)' and provides instructions for uploading a CSV file. A large text box labeled 'Upload or drop CSV file here' contains two buttons: 'Upload Files' and 'Or drop files', both of which are highlighted with a red box.

Home Bulk Registration Help & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)
2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
 - a. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
 - a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
 - b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100) **High Volume (5,000)**

Employee Upload
(High Volume)

If you're uploading between 101 and 5,000 employees, upload or drop file below. (This process may take up to 30 minutes to complete.)

Upload or drop CSV file here

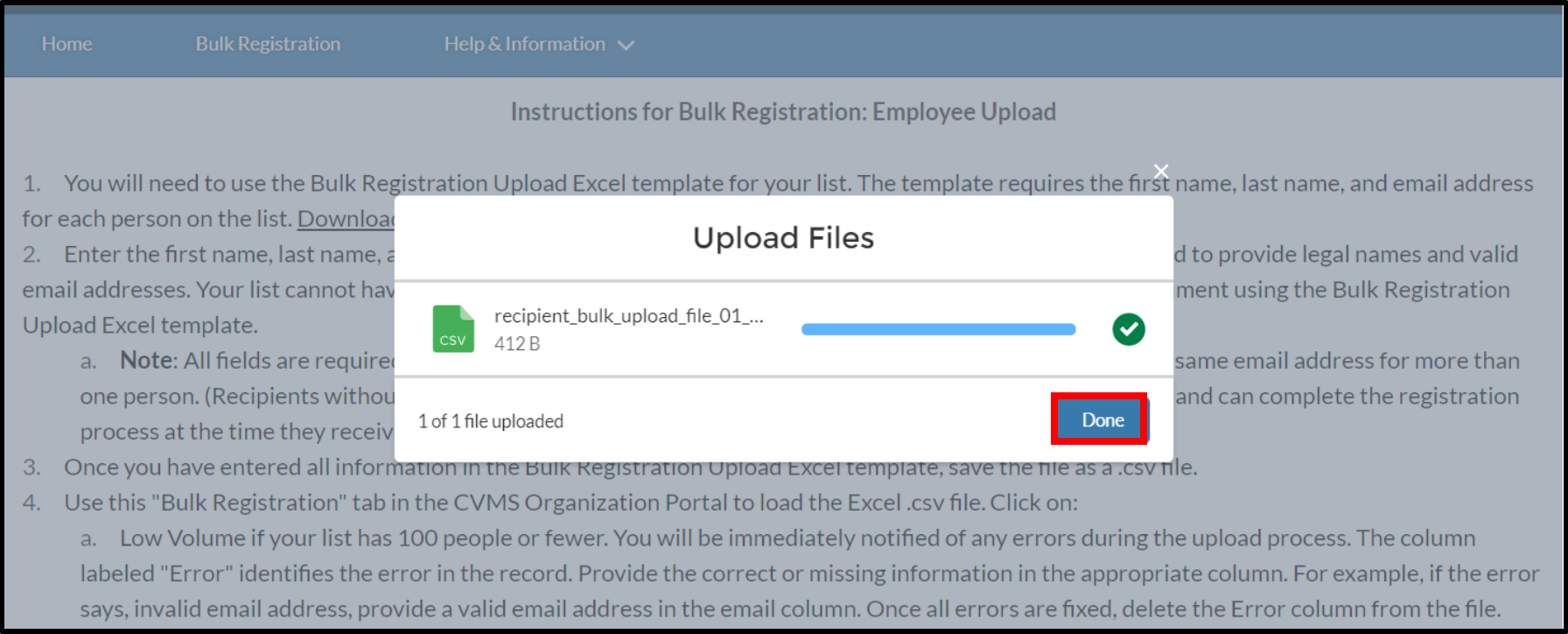
[Upload Files](#) Or drop files

Step 2 of 4: While Your High-Volume Recipient Bulk Upload is Processing

Unlike the low volume process, the contents of your file will not appear on the screen prior to completion of your file's upload.

It is also worth noting that larger files will take longer to upload. While CVMS processes your upload, you will be able to leave the page and it will continue processing in the background.

- 1. Click **DONE** once the upload is complete



Audience

Organization Point of Contact

Tips

This process may take up to 30 minutes to complete for larger files.

Step 3 of 4: Successful High Volume Recipient Bulk Upload

Once your file is successfully uploaded, you will see a **SUCCESS BANNER** appear at the top of the page. You will also receive an automatic email notification.

If all your recipient records were successfully created, you will receive an email notification with the number of successfully created records.

Successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATION** inviting them to **REGISTER** to the **COVID-19 Vaccine Portal**.

Audience

Organization Point of Contact

Tips

See the next section for how to manage failed recipient uploads.

Success
File submitted for processing

HomeBulk RegistrationHelp & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)

2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.

3. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)

4. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.

5. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:

6. a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.

7. b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the file.

8. Once the file is loaded, you can review all successful records.

9. Once someone is successfully entered into the CVMS system, they will receive an email invitation to register for the COVID-19 vaccine.

To access training

Low Volume (100)High Volume (5,000)

If you're uploading bulk

[External] Sandbox: Bulk Employee Upload - Success

NC CVMS <nccvms@dhhs.nc.gov>

To

Reply

Reply All

Forward

Wed 1/13/2021 12:33 PM

The Bulk Employee upload file has been successfully loaded with no rejected records. Details of the file loaded are below:

Filename:MKTrocheWITHErrors

Number of Records Successfully Loaded: 1000

Step 4 of 4: Failed High Volume Recipient Bulk Upload

If there were any errors in your file upload, you will receive an email notification with a summary of **SUCCESSFUL AND FAILED RECORDS**. In the next section, we will cover how to manage failed recipient uploads.

Only successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** to the **COVID-19 Vaccine Portal**.

Audience

Organization Point of Contact

Tips

See the next section for how to manage failed recipient uploads.



Correct File Errors

Step 1 of 3: Receive Email with Upload File Errors

If any recipient records included in your recipient bulk upload failed to upload, you will **AUTOMATICALLY BE SENT AN EMAIL** from the CVMS Organization Portal.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

- 1. OPEN THE EMAIL
- 2. OPEN THE EXCEL ATTACHMENT in the email

Not set				Unrestricted		Confidential	
	A	B	C	D	E	F	G
1	FirstName	LastName	PersonEmail	Error			
2	Kristin1	Test	kristin1test@mailinator.com	Line 1: Email Address is duplicate			
3	Kristin2	Test	kristin2test@mailinator.com	Line 2: Email Address is duplicate			
4	Kristin3	Test	kristin3test@mailinator.com	Line 3: Email Address is duplicate			
5	Kristin4	Test	kristin4test@mailinator.com	Line 4: Email Address is duplicate			
6	Kristin5	Test	kristin5test@mailinator.com	Line 5: Email Address is duplicate			
7	Kristin6	Test	kristin6test@mailinator.com	Line 6: Email Address is duplicate			
8	Kristin7	Test	kristin7test@mailinator.com	Line 7: Email Address is duplicate			
9	Kristin8	Test	kristin8test@mailinator.com	Line 8: Email Address is duplicate			
10	Kristin9	Test		Line 9: Email Address is blank			
11		Test		Line 10: First Name is blank Email Address is blank			
12	Kristin11			Line 11: Last Name is blank Email Address is blank			
13							

Audience

Organization Point of Contact

Tips

You will be sent an email with any failed, whether you use the Low Volume tab or the High-Volume tab.

Step 2 of 3: Fix File Errors

Inside the attachment will be a list of recipients records that failed to load into the system.

Successfully loaded recipients will not be included in this list.

- 1. In the Excel file attached to the email, find the column **ERROR**
- 2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME EXCEL FILE**

Audience

Organization Point
of Contact

Not set					
Confidential					
Highly Confidential					
	A	B	C	F	G
1	FirstName	LastName	PersonEmail	Error	
2		TestLoadE2ERecip2	Nicholas.NoEmail@company.email2.com	Line 2: First Name is blank	
3	Nicholas		Nicholas.NoEmail@company.email3.com	Line 3: Last Name is blank	
4	Nicholas	TestLoadE2ERecip4		Line 4: Email Address is blank	
5	Nicholas	TestLoadE2ERecip5	bademail	Line 5: Email Address is invalid	

Step 3 of 3: Save and Re-Upload the Updated Recipient Bulk Upload File

Once you review and correct any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**. If you have less than 100 errors to correct, you can re-upload your file using the Low Volume tab option.

1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**
2. **SAVE** the file as a **.CSV**
3. Navigate to the **BULK REGISTRATION** tab
4. Upload your file using the **LOW VOLUME OR HIGH-VOLUME TAB**

Home **Bulk Registration** Help & Information

Instructions for Bulk Registration: Employee Upload

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2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
 - a. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
 - a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
 - b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100) High Volume (5,000)

Employee Upload
(Low Volume)

If you're uploading 100 employees or less, upload file below.

Drag and Drop CSV file here

Audience

Organization Point
of Contact

Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, and Email address.

Fix File Errors – Potential Reasons for Failure

There are a few reasons why a recipient record may fail to be uploaded – from blank fields to invalid data formats.

Potential Error Messages:

1. EMAIL ADDRESS IS DUPLICATE:

- Meaning: The email address you attempted to upload was already found in the system. CVMS currently requires a unique email for each recipient, since confidential information can be sent by email address if recipient elects to use email as a channel of communication when they register.
- This error indicates the recipient has already been created through either the CVMS Organization Portal or another means and has already received an invitation to the COVID-19 Vaccine Portal. No further action is required.

2. FIRST & LAST NAME CANNOT BE EMPTY:

- Meaning: A name value was not entered

3. EMAIL CANNOT BE BLANK:

- Meaning: A email value was not entered

4. INVALID EMAIL ADDRESS:

- Meaning: An invalid email address was submitted. CVMS looks for @ sign in email field.

Audience

Organization Point
of Contact

View Uploaded Recipient Records

View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Organization Portal via the **HOME TAB**.

- 1. Navigate to the **BULK REGISTRATION TAB**
- 2. Locate the table of **LOADED RECIPIENTS**
- 3. You can **SEARCH LOADED RECIPIENTS** by **FIRST NAME AND LAST NAME** in the list view search bar
- 4. You can also **SORT** by clicking the **COLUMN NAME**
- 5. A small **ARROW** will appear next to the column name when you sort

Total number of records: 10272

Search this list...

First Name ↑	Last Name	Email
Albert1	Agatha	albertagatha@mail.com
Alex1	Wilda	alexwilda@mail.com
Alexander1	Veda	alexanderveda@mail.com
Alfred1	Vina	alfredvina@mail.com
Allen1	Albina	allenalbina@mail.com
Andrew1	Sudie	andrewsudie@mail.com
Archie1	Ludie	archieludie@mail.com

Audience

Organization Point of Contact

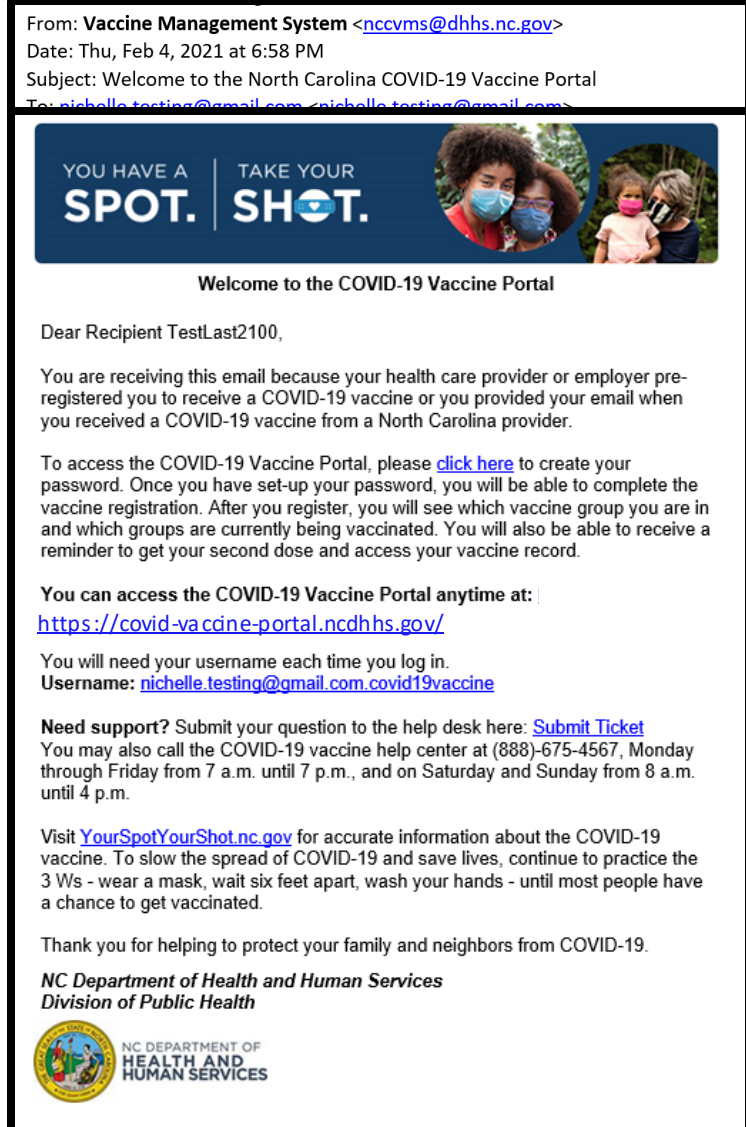
Tips

Remember, all successfully loaded recipients will automatically receive an email allowing access to register to the COVID-19 Vaccine Portal.

You **CANNOT EDIT OR DELETE YOUR LOADED RECIPIENTS**. If you need to remove an uploaded recipient, please go to the CVMS Help Desk Portal at https://ncgov.servicenowserVICES.com/csm_vaccine, select **VACCINE RECIPIENT** and submit a request.

Next Steps for the Uploaded Recipients

COVID-19 Vaccine Portal Email Notification



Once successfully loaded into the CVMS Organization Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:

Vaccine Management System nccvms@dhhs.nc.gov

Email Subject: Welcome to the COVID-19 Vaccine Management System

The email will allow recipients to **REGISTER IN THE COVID-19 Vaccine Portal.**

A COVID-19 Vaccine Portal Account is **NOT REQUIRED** to **RECEIVE A COVID-19 VACCINE.**

If your recipients do not have a valid email address or do not want to register, they may contact any participating COVID-19 vaccinating provider to verify their eligibility and schedule an appointment for a COVID-19 vaccine. They can go to <https://covid19.ncdhhs.gov/findyourspace> to see a list of vaccinating providers and information on Priority Tiers and Eligibility.

Audience

Recipient

Tips

Inform your recipients to allow incoming emails from nccvms@dhhs.nc.gov.

Their COVID-19 Vaccine Portal username is the email address that was uploaded for them followed by .covid19vaccine.

COVID-19 Vaccine Portal Password Reset & Username

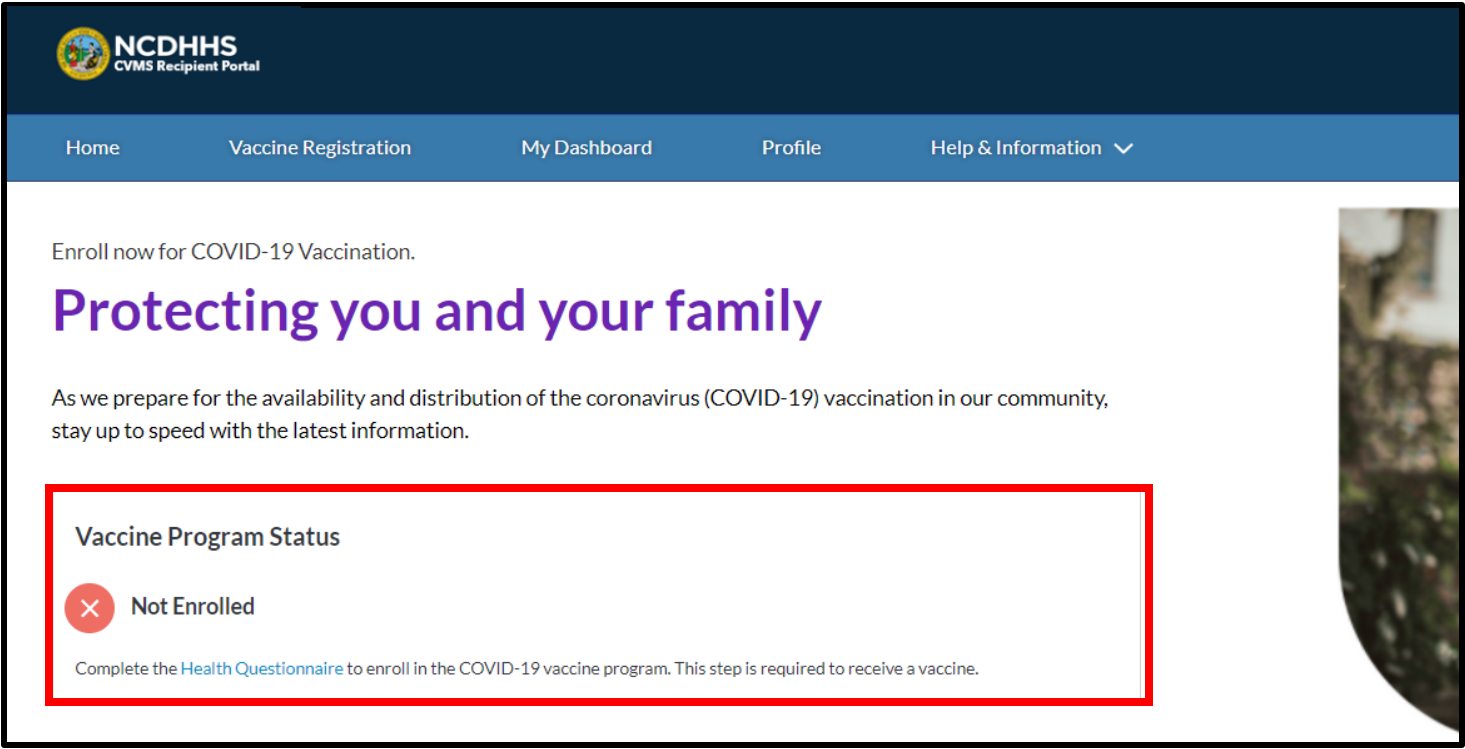
The email notification will prompt recipients to **RESET THEIR PASSWORD** and will provide their **COVID-19 VACCINE PORTAL USERNAME**.

The COVID-19 Vaccine Portal Username has **.COVID19VACCINE** added to the end of the email address that was uploaded for them. They must use the correct username to be able to sign into the COVID-19 Vaccine Portal.

After registering, recipients will be able to complete the **COVID-19 VACCINE REGISTRATION** and will automatically receive their **COVID-19 VACCINE ELIGIBILITY STATUS**.

Audience

Recipient



COVID-19 VACCINE PORTAL COVID-19 VACCINE REGISTRATION

Once they log into the **COVID-19 VACCINE PORTAL**, they will be able to complete the **COVID-19 VACCINE REGISTRATION**. The COVID-19 Vaccine Registration asks for **DEMOGRAPHIC DETAILS** as well as a few **MEDICAL DETAILS**. Recipients will receive their **COVID-19 VACCINE ELIGIBILITY STATUS** after submitting the COVID-19 Vaccine Registration.

A recipient's Eligibility Status is determined by the Vaccine Group they fall under as determined by the NC Immunization Branch. Eligibility requirements may be adjusted in the future by the NC Immunization Branch.

Audience

Recipient

Tips

Inform your recipients that they should register using the invitation they were sent by email prior to their first vaccine appointment if possible. This will allow them to check their Eligibility Status, and it should save them time on the day of their first dose appointment.

HomeVaccine RegistrationMy DashboardProfileHelp & Information

IntroductionContact and Demographic DetailMedical DetailsConfirmation

Please provide your medical background

* How many conditions known to increase risk of severe illness from COVID-19 do you have?

☐ None

☐ 1


☐ 2 or more

*Review the CDC website to see list of conditions known to increase risk of severe illness to COVID-19 at:

<https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/people-with-medical-conditions.html>

Previous

Next







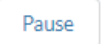
NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox or Safari, or Edge (Chromium only) browsers to access CVMS.
- For more details on supported browsers, please see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	2/11/2021	<ul style="list-style-type: none">• Initial Document	-	Nicholas Rinz, Kristin Clark
2	2/26/2021	<ul style="list-style-type: none">• Updates to Error Message	31	Nicholas Rinz, Steve DiGangi